Quick Bites

Season Close Out – Service Unit Check list

Use these steps to close out your Cookie Program season.

1. Run the Troop On-Hand Inventory Report.
    a. Ask Troops to distribute remaining inventory to girls.
    b. Troops with a negative balance should review all transfers to girls and correct any errors.
2. From the SU Dashboard, click the link titled Troops with undistributed TDS (Troop Direct Ship Orders)
    a. Advise troops to distribute packages to girls to ensure that girls get credit for all troop sales.
    b. If the season end date for troops is in the past, the SU user may mimic the troop volunteer to distribute packages.
    c. Troop ship only orders may be moved to another troop by a SU user; however, you should only do so under direction from the council. Best Practice is to distribute to girls in the troop.
3. From the SU Dashboard, click the link titled Troop with undistributed Virtual Delivery Orders.
    a. Ensure troops have allocated cookies to girls – some troops may use troop to girl booth packages transfers or add these totals to another booth divider.
4. From the Service Unit dashboard click the link titled Troops with no main recognition order. Contact Troops to ask them to create the order or create an order on behalf of the Troop.
5. From the Service Unit dashboard, click the link titled Troops with incomplete recognition orders. Contact Troops to advise them to complete the order or edit the order to correct errors as directed by your Council.
6. If your Council offers a Troop recognition program, ensure all Troops have created an order or create on behalf of the Troop.
7. Manage Recognition Orders
    a. Ensure all orders are complete by checking that status shows as “Complete.”
    b. Filter for Main Orders, click box in upper left blue bar to select all main orders.
    c. Unsubmit all orders. Unsubmitting all orders will ensure that any late changes to earned package totals are updated
    d. Select all orders again.
    e. Submit all Main Orders. Status will change to “S” when complete.
    f. If your Council has a Troop Reward plan, filter your recognition order for Troop.
    g. Follow steps C and D for troop orders
    h. Submit all Troop recognition orders. Status will change to “S” when complete.
    i. Run the Recognition Order Summary by Troop report and save the report to help with distributing recognitions
8. If an alternate volunteer is accepting the SU reward shipments, confirm they are listed under the alternate contact on the SU information page. Both contacts will appear on the packing list, but shipment will be made to the alternate contact if populated.
9. Reports:

a. Total Troop Sales and Finances by Troop, view 1 and 2
b. Troop Balance Summary (snapshot) for each Troop
c. Recognition Order Summary by Troop